



Office Assistant

Office Assistant

User Guide

Release 17.4

Document Version 1

BroadWorks® Guide

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1 Summary of Changes

This section describes the changes to this document for each release and document version.

1.1 Release 17.sp4, Document Version 1

Initial document.

2 Introduction

2.1 About Office Assistant

Office Assistant is a customized version of the BroadWorks Assistant-Enterprise software. It is carrier-class, lightweight desktop communications management product for everyday users of Microsoft Outlook and Microsoft Internet Explorer with the Hosted PBX platform.

With this product you can maintain up-to-date connection information and configure controls on your calls.

2.2 About This Guide

This guide provides step-by-step procedures and reference information for Office Assistant for Release 17.sp4.

Office Assistant is interchangeably used with Assistant in this document.

2.3 Accessing Office Assistant

Office Assistant is an add-in to Microsoft Internet Explorer and Outlook that provides new toolbars to access Hosted PBX Service and Call Management features within your web browser and mail client.

Office Assistant is also compatible with Mozilla Firefox up to release 9. It is not compatible with any version higher than Release 9. Therefore, it is recommended to only use it with Internet Explorer and Outlook.

When you open Internet Explorer or Outlook with Assistant you see the following toolbar. Most buttons are disabled until you log in.



Figure 1 Office Assistant in Internet Explorer



Figure 2 Office Assistant in Outlook

2.4 First Time Login

Logging in to Assistant identifies you to the servers that manage your phone services. This is so you can receive, initiate, and control calls directly from your computer.

When you log in for the first time, you need to configure your connection settings as described in the following steps. Once these settings are configured, you do not need to provide them again.

You can log in directly from the toolbar by clicking Login.

- 1) Click **Login** on the toolbar.

Assistant opens the *Options* dialog.

- 2) Click **Account**.

- 3) To configure your account settings, enter, in the provided fields, the user name and password provided by your administrator for your Assistant account.

The format for the username will be *10_digit_phone_number@domain*. The domain for the Hosted PBX service is **bizcommservices.com**.

The password will be the same password used to access the Hosted PBX My Phone dashboard.

- 4) Check the *Save Username* and *Save Password* options if you want to avoid being prompted for this information next time you log in. Your password is encrypted for greater security.
- 5) Click **Apply**.

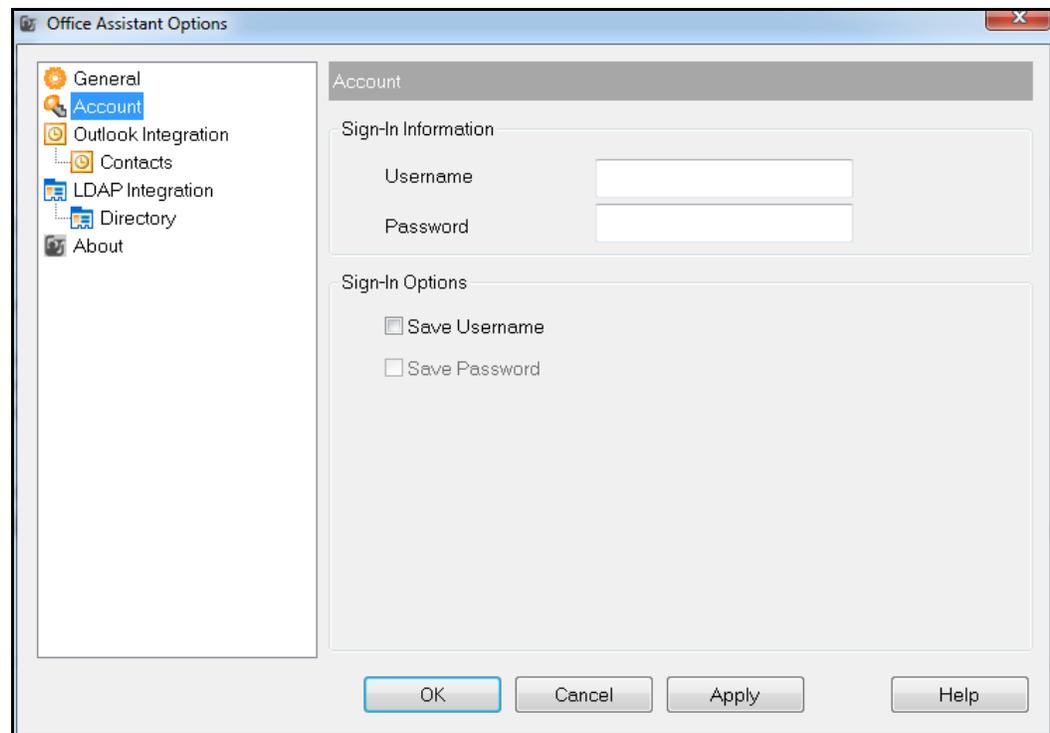


Figure 3 Options Dialog – Accounts Page

- 6) To configure your general settings, click **General**.
- 7) The *Auto login when connected to network* option is enabled by default. This means that Assistant will automatically connect to the Hosted PBX server when a network connection is available when Internet Explorer or Outlook are opened. If the box is not checked, a manual click on the login button is necessary to connect Assistant to the network.
- 8) Click on the *Hide call notifications* checkbox under Alerts to disable pop-ups on incoming calls. This is disabled by default. See [Section 3.2.1](#) for more details on functionality included in the call notifications pop-up window.
- 9) Click **OK**.

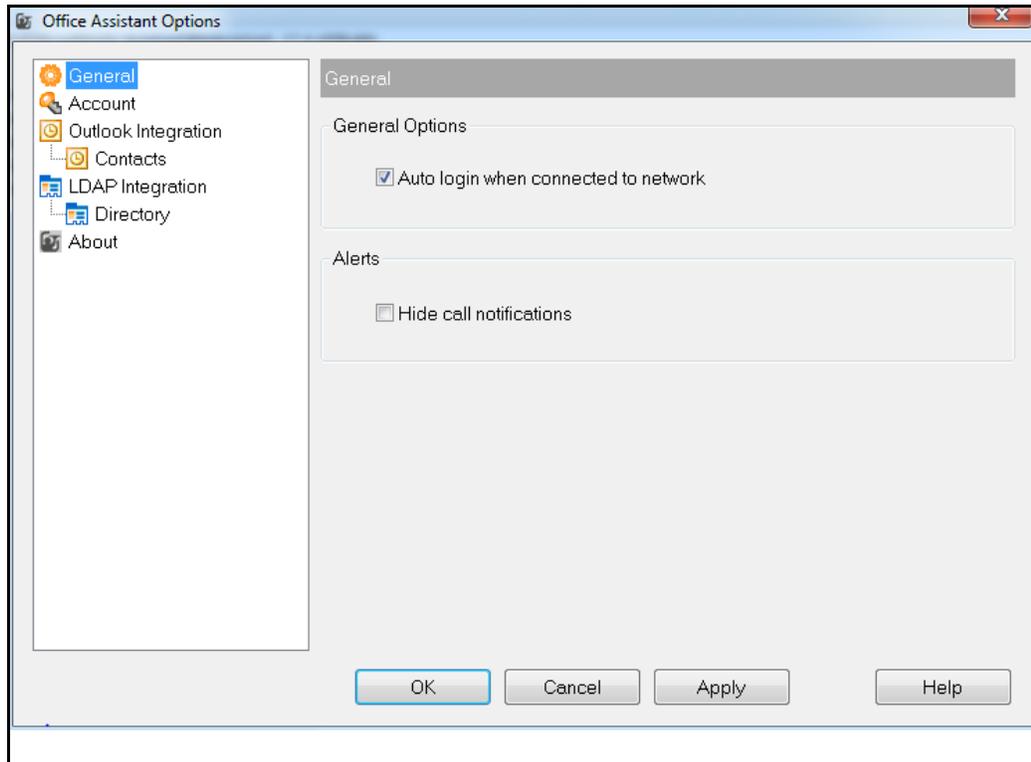


Figure 4 Options Dialog – General Page

If your configuration and credentials are correct, you are connected to the BroadWorks server and the buttons on your toolbar are enabled.



Figure 5 Enabled Toolbar

2.5 Subsequent Access

Once you have configured Office Assistant with the settings it needs to connect to your service provider, you can be automatically logged in when you start Internet Explorer or Outlook without having to provide that information again.

If you change your password in the My Phone dashboard, you will have to update the password in Office Assistant to successfully login. If the My Phone password is different than the password stored in Assistant, you will receive the following error on the next login.

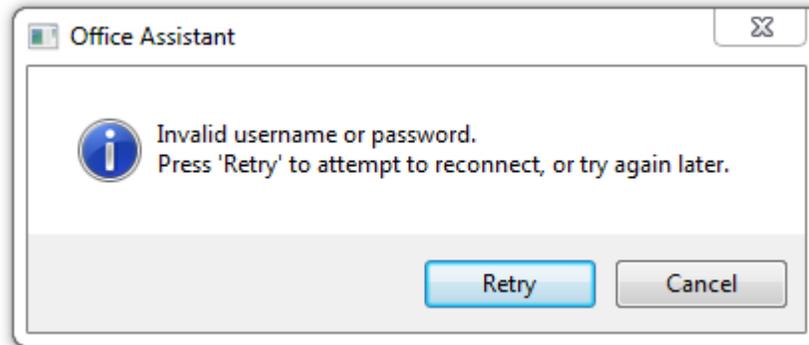


Figure 6 Invalid Username or Password Error Message

Follow the steps below to update the username or password.

- 1) Click on the **Options** button  in the Tool bar. This will bring up the Options dialog box.
- 2) Click on **Account**.
- 3) Enter the changes to the username or password in the appropriate fields.
- 4) Click on **Apply** to save or **OK** to save and exit the Options dialog.

3 Using Office Assistant

When you have successfully logged in to Assistant, most of the buttons on your toolbar are enabled.

3.1 The Toolbar



Figure 7 Office Assistant Toolbar (Outlook)

Detailed Description of Buttons

Login: Logs in and out of Assistant. The color of this icon indicates your login status.

A grey icon indicates that you are not logged in. A green icon shows that you are currently logged in. A disabled button shows that Assistant is attempting to log in. A red button indicates that your last login attempt failed.



Figure 8 Login Button

Options: You can configure your BroadWorks account, connection settings, and dialing rules through this dialog. This icon is highlighted when open.



Figure 9 Options Button

Services: You can configure the Call Management services provided by Assistant. This icon is highlighted when in use.

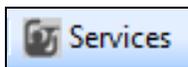


Figure 10 Services Button

Call Forward Always service automatically forwards all incoming calls to a specified phone number. When this service is enabled, this icon remains highlighted.

If Call Forward Always is not yet configured when you use this icon to activate the service, Assistant opens the *Service* dialog to the *Call Forwarding Always* page for you to configure the service.



Figure 11 Call Forwarding Always Service Button

Do Not Disturb service automatically forwards all incoming calls to your Voice Messaging service, or plays callers a busy tone if you do not have a Voice Messaging service configured. While the service is enabled, this icon remains highlighted.



Figure 12 Do Not Disturb Service Button

Company Contacts permits you to dial phone numbers in your company directory by clicking them.



Figure 13 Company Contacts Button

Hosted PBX Web Links drop-down list contains URLs to assist you with further management of your services. Select an item from the list to navigate to that page in your web browser.

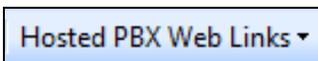


Figure 14 Hosted PBX Web Links Drop-down List (Outlook)

There are two links configured to allow you to easily navigate to web sites that assist you in managing your service.

- **Hosted PBX My Phone User Portal** will navigate to the login screen for the portal. You can use this to further customize your features.
- **Hosted PBX Support** will navigate to the general support page for the Hosted PBX product.

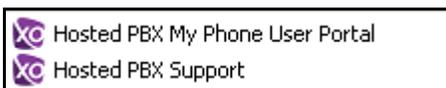


Figure 15 Hosted PBX Web Links

Dial Contact dials the business, home, or mobile number of a selected contact within Microsoft Outlook.



Figure 16 Dial Contact Drop-down List

Dial Number dials a specified number.

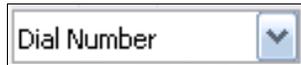


Figure 17 Dial Number Combo Box

Answer answers an incoming call. This button becomes available upon receipt of a call.



Figure 18 Answer Button

Hold puts the current call on hold. This button is available for the duration of a call.



Figure 19 Hold Button

Transfer to Voice Mail transfers the current call to your *Voice Messaging* service. If the color of the envelope icon on the *Transfer to Voice Mail* button changes, as illustrated in [Figure 21](#), then a new voice mail is available.



Figure 20 Transfer to Voice Mail Button



Figure 21 Transfer to Voice Mail Button with Voice Mail Waiting Indication

Transfer transfers the current call to another phone number. This button becomes enabled when you are connected to two parties at the same time allowing you to perform an attended transfer of one party to the other.



Figure 22 Transfer Button

Conference starts a conference call that can include 3 callers. This button only becomes enabled when you are connected to two other parties at the same time.



Figure 23 Conference Button

End Call ends the current call. This button becomes active upon receipt of an incoming call and stays active for the duration of the call.



Figure 24 End Call Button

Call Lines lists your phone numbers you are currently connected to.



Figure 25 Call Lines Drop-down List

3.2 Make a Call

When using Office Assistant to make calls, there will be initially be an incoming call to your Hosted PBX phone that must be answered. After answer, an outgoing call will be initiated to the dialed destination. The following section describe the various methods available to use Assistant to initiate calls.

3.2.1 Dial Number

To dial a new number:

- 1) Type the number in the *Dial Number* box.
- 2) To place the call, press ENTER.
- 3) An incoming call will be initiated to your phone. Click **Answer** in the Toolbar or answer the call using the phone to answer the call.
- 4) An outbound call will be initiated to the dialed number.
- 5) To end the call, click **End**.



Figure 26 Dial Number Box

To redial a previously dialed number:

- 1) Select a number by clicking on the arrow at the right-hand side of the *Dial Number* box.

A list of up to 10 previously dialed numbers is displayed.

- 2) Click on a number in the *Dial Number* list.
- 3) To place the call, press ENTER.
- 4) Click **Answer** in the Toolbar or answer the call using the phone to answer the incoming call.
- 5) An outbound call will be initiated to the redialed number.
- 6) To end the call, click **End**.

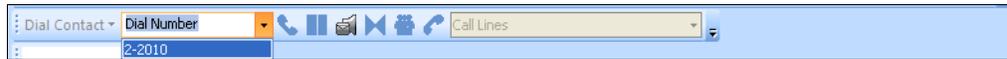


Figure 27 Redial Previous Number

3.2.2 Dial from Web Page

To dial from a web page:

- 1) Select the phone number displayed on a web page.
- 2) Highlight the number with your mouse.
- 3) Right-click the highlighted phone number and select *Dial* from the pop-up window.

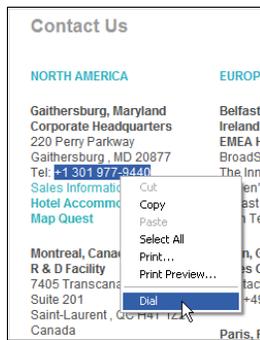


Figure 28 Dialing from Web Page

3.2.3 Dial from Contact List

With Office Assistant you can dial a home, business, or mobile number of any contact directly within Outlook.

NOTE: When you click a phone number for a contact in Internet Explorer 8, the following message can appear: "Do you want to allow this web site to open a program on your computer?" If you do not want to see this message again, uncheck the *Always ask before opening this type of address check box*.

- 1) Click *Contact* in the folder list.
- 2) Select the contact you wish to call from the contact list.
- 3) Click the arrow at the right-hand side of the *Dial Contact* drop-down list, on the Assistant toolbar within Outlook.

- 4) Select the type of number to call.

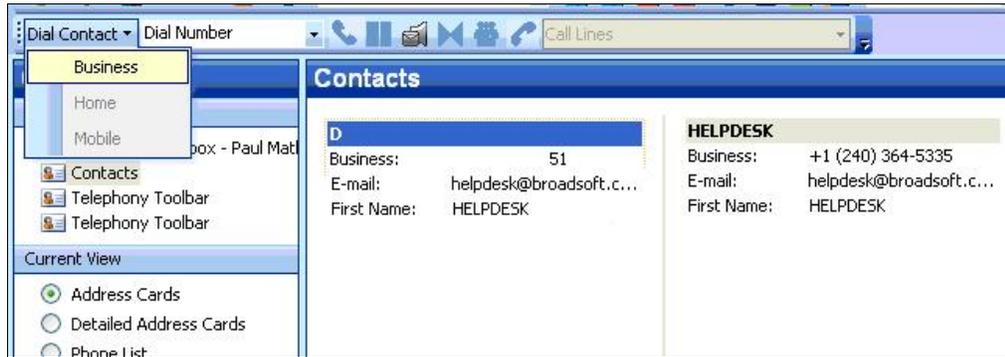


Figure 29 Dialing from Contact List

3.2.4 Dial from vCard

To dial from a vCard in Outlook 2000/2002/2003:

- 1) Click *Contacts* in the folder list.
- 2) Double-click the contact you want to call. Outlook opens the contact's vCard.
- 3) Click the arrow at the right-hand side of the *Dial Contact* drop-down list, on the Assistant toolbar within Outlook.
- 4) Select the type of number to call.

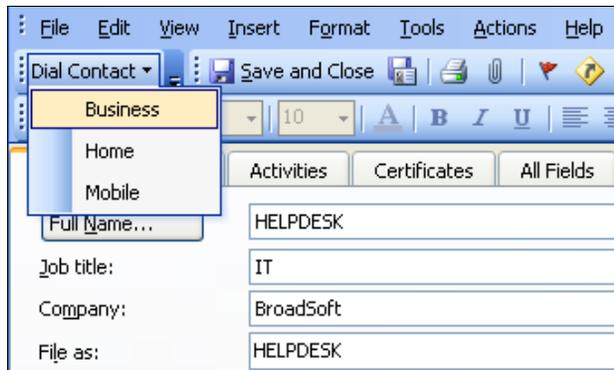


Figure 30 Dialing from vCard

To dial from a vCard in Outlook 2007:

- 1) Click *Contacts* in the folder list.
- 2) Double-click the contact you want to call. Outlook opens the contact's vCard.
- 3) Click the **Telephony Toolbar** tab.
- 4) Select the type of number to call.



Figure 31 Dialing from Outlook 2007 vCard

NOTE: If there is no number specified for a contact, but you click on the Home, Business, or Mobile buttons in your vCard ribbon, a message appears stating “No number is specified for this contact”. This is, by design, a limitation of Microsoft Outlook 2007 API.

3.2.5 Dial from Company Contacts Directory

You can directly dial any number stored in your Company Contacts directory that integrates the with Assistant.

- 1) Click **Company Contacts** on the Assistant toolbar.
This list can be printed using the host application. Users with Microsoft Windows XP Service Pack 2 installed may encounter a warning when opening the Group Directory. For more information, see section [6 Troubleshooting](#).
- 2) To sort the directory, click on a *column* header. The table is sorted, in descending order, according to the information in the column you selected.
- 3) To change the sort order between descending and ascending, click on the same *column* header again.
- 4) To dial a number from the directory, click on the desired phone number. Assistant places the call.

Office Assistant - Company Contacts				
Office Assistant - Company Contacts				
Name	Number	Extension	Mobile	Department

Figure 32 Company Contacts Directory

3.3 Receive Call

3.3.1 Answer Call

When you receive a call, Assistant displays a call notification window on top of the system tray. You can answer this call by picking up your handset from the Assistant toolbar or by clicking the call notification.

- To answer a call from Assistant, click **Answer**.
- To answer a call from the call notification, click on the hyperlinked text for the calling party.

When using Assistant with Outlook, if the incoming call does not provide a name for the calling party, Assistant checks the number against your Outlook contacts and displays the corresponding name if it finds a match.

You can also transfer the caller to your Voice Mail, save a vCard for the caller, or end the call directly from the call notification.

3.3.2 Call Notification

When you initiate or receive a call, Assistant displays a notification window above the system tray, which includes the other party's phone number and other information about the call. Clicking the hyperlinked text in the call notification automatically answers the call.

The call notification stays open for the duration of the alerting call.

If you initiate or receive another call while the first notification is open, the call notifications stack on top of one another.



Figure 33 Call Notification

3.3.2.1 Call Notification - Transfer to Voice Mail

When you receive an incoming call and the notification window is open, you can transfer the call directly to voice mail by clicking on the Transfer to Voice Mail icon at the top of the notification window.



Figure 34 Transfer to Voice Mail from Call Notification

3.3.2.2 Call Notification - Save vCard

When the call notification window is open, you can save the caller's phone number and information as a vCard in Outlook. Click on the Save vCard icon at the top of the notification window to begin this process.

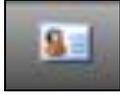


Figure 35 Save vCard from Call Notification

3.3.2.3 Call Notification - End Call

When the call notification window is open, you can end a call by click on the End call icon at the top of the notification window.



Figure 36 End Call from Call Notification

If it is an incoming call and the end call button is pressed, the call is rejected. If voice mail is active on the user, the call will transfer to voice mail and the caller will receive the busy greeting for the called party.

3.4 During a Call

3.4.1 Hold Call

- 1) To hold a call, click **Hold** on the toolbar. The Hold button is grayed out to indicate the held status of the call.
- 2) To resume a held call, click **Answer** (highlighted) on the toolbar. The hold returns to its normal state to indicate the active status of the call.



Figure 37 Hold Button

3.4.2 Attended Transfer

Use this method to transfer a call to another specified number and provide an introduction to the destination party. Calls may be transferred this way while active, held, or ringing on your phone.

When an attended transfer is initiated, the primary call is placed on hold and a call is made to the party intended to receive the call. The receiving party may be consulted prior to accepting the call.

- 1) If the first party is not already on the line, dial a number on your phone or select a number using any of the methods described in section [3.2 Make a Call](#).
- 2) Call the second number. This puts the first party on hold.
- 3) Wait until the called party accepts your call, and then click **Transfer** to connect the parties.



Figure 38 Transfer Button

3.4.3 Three-Way Calling

You can initiate a conference with two other parties directly from the toolbar. A three-way call can be established with calls that were initiated or received by the user with Office Assistant.

3.4.3.1 Initiating a Three-Way Call

The steps below explain how to initiate a three-way call using the Assistant toolbar as the primary means for call control. Three-way calls can also be initiated from the phone.

- 4) Dial the number for the first terminating party for the call using one of the methods described in Section 3.2.
- 5) Answer the incoming call by clicking the **Answer** button on the toolbar.
- 6) After the subsequent outgoing call to the first party is answered, click on the **Hold** button to place the first party on hold. Note, the number for the first call shows up in the *Call Lines* dialog box.
- 7) Dial the number for the second terminating party for the call using one of the methods described in Section 3.2.
- 8) In the *Call Lines* box, click on the incoming call for the second party.
- 9) Answer the incoming call from the second party by clicking the **Answer** button on the toolbar.
- 10) To start the conference, click the **Conference** button on the toolbar. This will take first party off hold and join them to the three-way call. If the conference button is pressed during ringing, the first party will hear ringing. Pressing the conference button after the second party answers will allow for the three-way call to be announced to the second party.
- 11) To drop only one participant from the conference, select the participant's number from the *Call Lines* drop-down list and click **End**.

3.4.3.2 Bridging an Incoming Call with an Existing Call

The steps below explain how to bridge an incoming call to an existing call using the Assistant toolbar as the primary means of call control. The assumption for this process is there is an existing call in progress that is in the Call Line box.

- 1) When the second call is received, the second number will appear in the *Call Lines* box and the *Call Notification* window (if enabled) will pop up.
- 2) Answer the call using either method described in Section 3.3. When the second call is answer, the first call will automatically be put on hold.
- 3) After answering, click on the first call in the Call Lines box. It will display as On Hold.
- 4) Begin the three-way call, by clicking the **Conference** button.
- 5) To drop only one participant from the conference, select the participant's number from the *Call Lines* drop-down list and click **End**.

3.4.3.3 Disconnecting from Three-Way Call while Other Parties Remain Bridged

The steps below explain how to leave a Three-Way conference while allowing the other parties to remain on connected. The assumption for this process is that a Three-Way Call has been established using one of the methods described above.

- 1) After hitting the Conference button to establish the Three-Way Call, click on one of the calls in the Call Lines box.
- 2) Click the **Transfer** button in Assistant. This performs a transfer of the call to the other party.
- 3) Neither call will be active in the toolbar and the call should be ended on the phone.

3.4.3.4 Ending a Three-Way Call

A Three-Way Call can be ended in one of two ways.

- 1) Dropping each leg one at a time by selecting the participant's number from the *Call Lines* drop-down list and clicking **End**.

OR

- 2) Simply hanging up the handset on the phone. This will end the call to all parties simultaneously.

3.5 End a Call

You can end both incoming and outgoing calls directly from the toolbar and from the call notification window.

- To end a call from the toolbar, click **End** on the toolbar.
- To end a call from the call notification, click **End Call**.

NOTE: When you end an incoming call before the call has been answered, the caller continues to hear the ringing tone until the caller hangs up. If the called party has Voice Mail activated, the call will forward to Voice Mail after the configured number of rings and the caller will hear the no answer greeting.

3.6 Voice Mail

3.6.1 Transfer to Voice Mail

You can transfer calls to your Voice Mail from the toolbar and from the call notification window.

To transfer a call to Voice Mail from the Assistant toolbar, click **Transfer to Voice Mail** on the toolbar.



Figure 39 Transfer to Voice Mail Button

To transfer a call to Voice Mail from the call notification, click the **Transfer to Voice Mail** icon in the notification window.

3.6.2 Check for New Voice Mail

If the color of the envelope icon on the **Transfer to Voice Mail** button changes, then a new voice mail is available. Otherwise the envelope is grayed out.



Figure 40 Transfer to Voice Mail Button Indicating New Voice Mail

3.6.3 Retrieve Voice Mail

Make sure that you are not currently engaged in a call. No entries must be present on the *Call Lines* drop-down list.

Transfer yourself to your Voice Mail by clicking the **Transfer to Voice Mail** button on the toolbar.

4 Options Dialog

The *Options* dialog allows you to configure the connection and account settings that Assistant uses to communicate with your service provider. The left-hand side of the dialog contains a tree view, listing the configuration pages you can access. The configuration pages you select in the tree view are displayed on the right.

- 1) Click **OK** to save all changes and close the dialog.
- 2) Click **Apply** to save all changes without closing the dialog. Cancel closes the dialog without saving your changes.

4.1 General Page

The *General* page allows you to configure the automatic login behavior of Assistant.

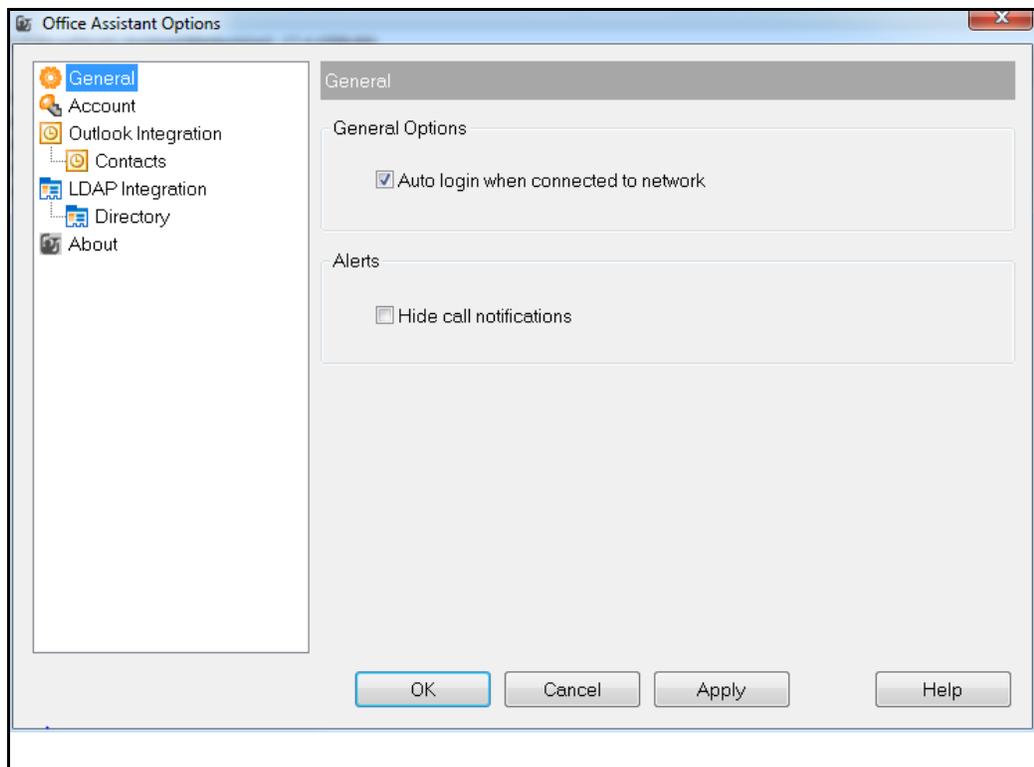


Figure 41 Options Dialog – General Page

- *Auto login when connected to network* automatically logs in to your service provider when it detects an active network connecting on your computer.
- *Hide Call Notification* disables the call notification window. When this box is checked, the call notification does not appear when Assistant detects an incoming or outgoing call.

After selecting the desired options, click **OK** and login with Assistant for the changes to take place.

4.2 Account Page

The *Account* page allows you to specify your BroadWorks user name and password. You can also change your password, if permitted to do so by your system administrator.

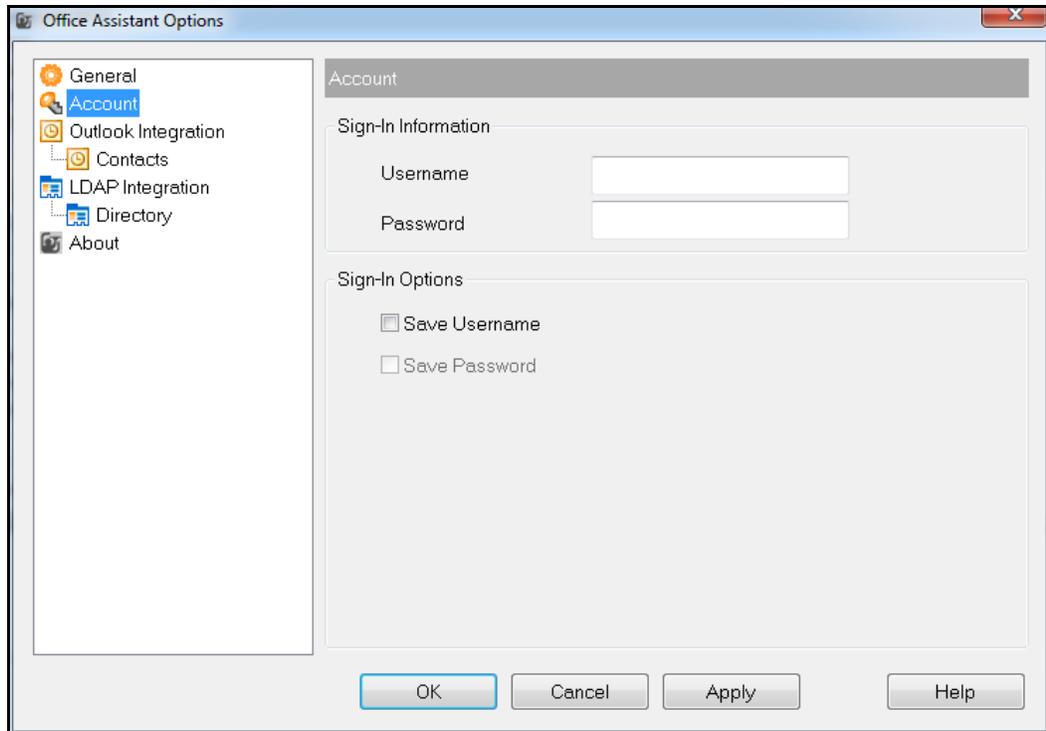


Figure 42 Options Dialog – Account Page

Contact your service provider or system administrator if you do not know the appropriate settings. Once you successfully log in, the controls on this page become inactive.

- *Save Username* determines whether Assistant saves the user name you provide. Check this box to avoid having to specify your user name each time you log in to the program.
- *Save Password* determines whether Assistant saves the password you provide above. Check this box to avoid having to specify your password each time you log in to Assistant.

Assistant encrypts your password for greater security.

4.3 Outlook Integration Page

The *Outlook Integration* page enables and disables the use of Assistant–Enterprise with Microsoft Outlook. As of Outlook 2007 you are unable to dial a contact in your in box using the right click-to-dial function.

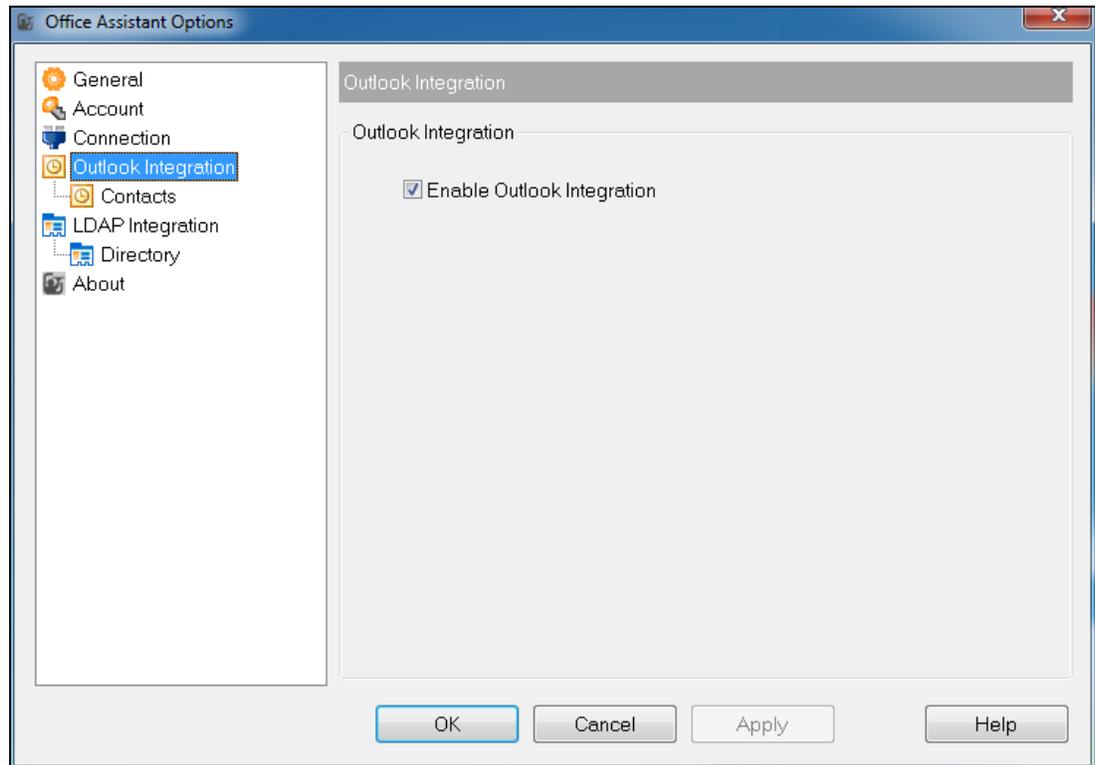


Figure 43 Options Dialog – Outlook Integration Page

The *Enable Outlook Integration* check box, when checked, makes sure that the Outlook integration features are activated.

4.3.1 Contacts Page

The *Contacts* page allows you to configure the way Assistant integrates with your Outlook contact list.

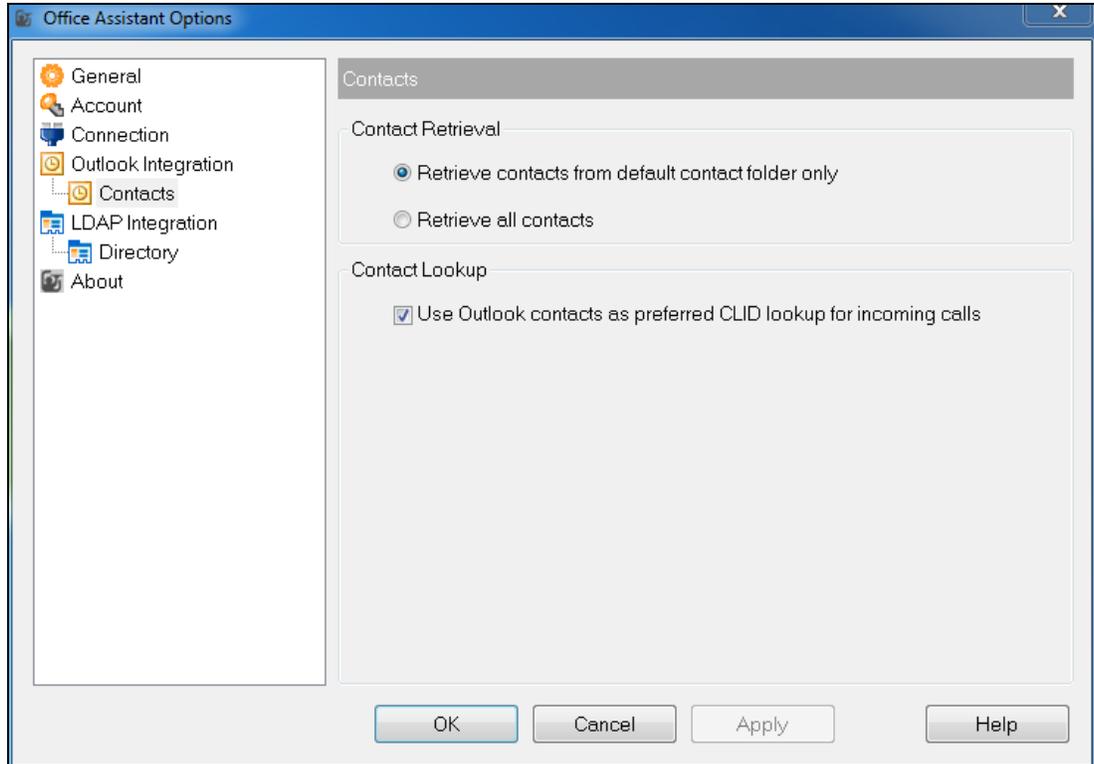


Figure 44 Options Dialog – Contacts Page

- The *Retrieve contacts from default contact folder only* option searches for and retrieves contacts stored in the default *Contacts* folder within Outlook.
- The *Retrieve all contacts* option searches for and retrieves contacts stored in any Outlook folder.
- *Use Outlook contacts as preferred CLID lookup for incoming calls* determines whether Assistant uses the information saved in your Outlook contact list when displaying information about callers, instead of using group settings or other calling line ID information.

4.4 LDAP Integration Page

The *LDAP Integration* page allows you to configure the settings Assistant uses to connect to the LDAP directory server.

NOTE: Make sure you have correctly installed a valid certificate in both the Current User and Local Machine Window certificate stores before attempting to connect with SSL option.

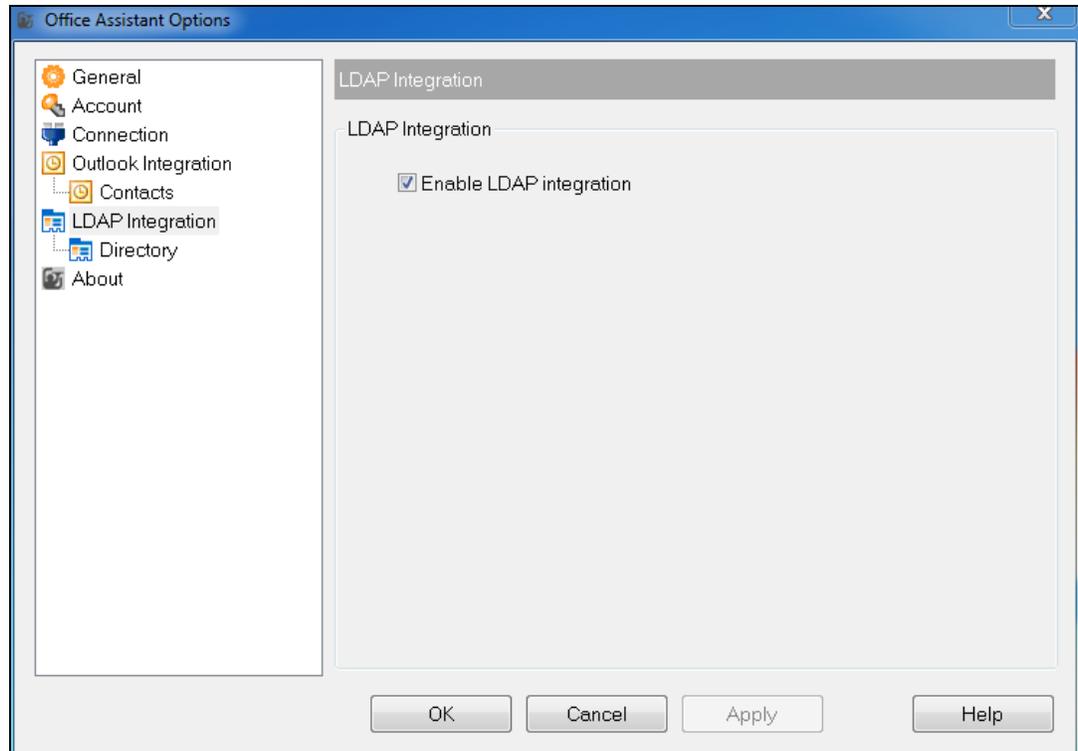


Figure 45 Options Dialog – LDAP Integration Page

Contact your internal system administrator if you do not know the appropriate settings.

Enable LDAP Integration determines whether Assistant provides LDAP directory lookup services. Checking this box enables the controls on the *Directory* page.

4.4.1 Directory Page

The *Directory* page allows you to provide the configuration settings required for Assistant to connect to your directory server.

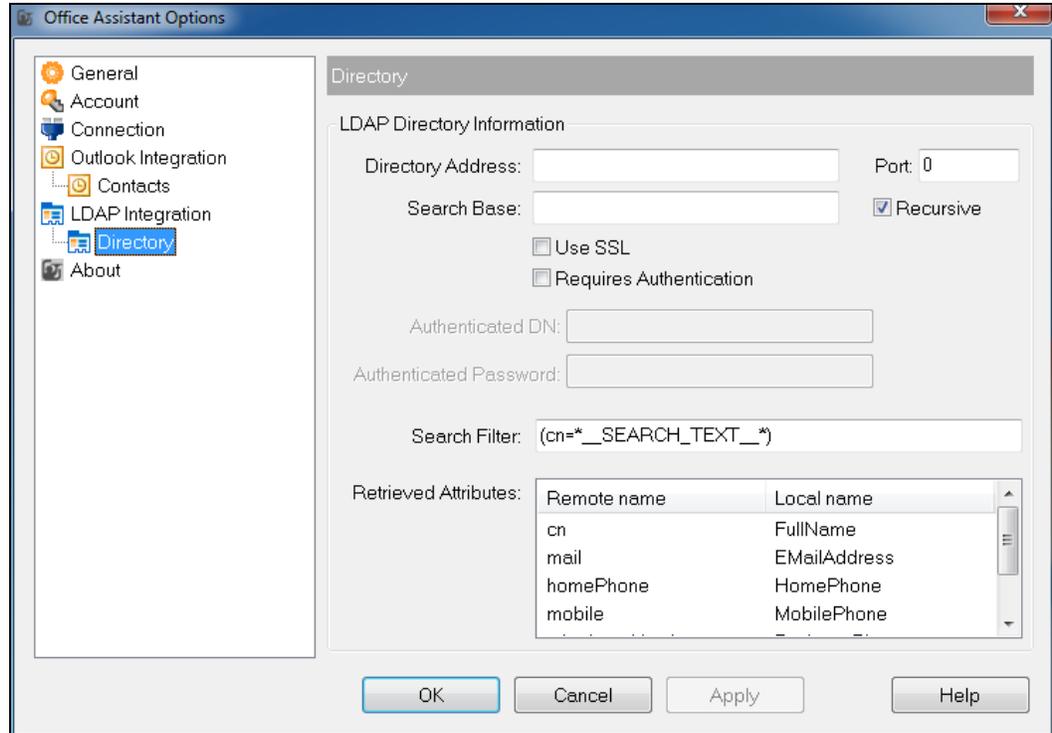


Figure 46 Options Dialog – LDAP Integration – Directory Page

Once you successfully log in, the controls on this page become inactive.

- *Directory Address* specifies the network address of the LDAP directory server.
- *Port* the port number for the LDAP server. This is compulsory and can be obtained from your system administrator.
- *Search Base* determines the location in the directory server tree that Assistant looks in when executing a search.
- *Recursive*, when checked, searches all sub-trees within the search base until the specifications are found.
- *Use SSL (Secure Sockets Layer)* determines whether Assistant uses SSL to connect to the directory server. Note that enabling SSL may require the use of a different port.
- *Requires Authentication* indicates whether Assistant must provide a user name and password to the directory server to conduct searches.
- *Authenticated DN* is the user name Assistant uses when connecting to the directory server when *Requires Authentication* is checked.
- *Authenticated Password* corresponds to the *Authentication DN*.

- *Search Filter* specifies an additional search filter to apply to all directory searches. For example, to include the search criteria in the filter you must include (cn=__SEARCH_TEXT__*). Alternatively in another example, “(telephoneNumber=*)” restricts search results to users who have a telephone number assigned.
- *Retrieved attributes* is a table that controls the way that Assistant maps attributes returned from the directory server to columns displayed in the list of search results. In each row of the table, enter an *LDAP* attribute in the *Remote Name* column. In the *Local Name* column, enter a corresponding local attribute. Typical Remote Name values are “cn”, “sn”, “telephoneNumber”, “mobile”, “homePhone”, and “mail”.

4.5 About Page

The *About* page displays the version, copyright notices, and product disclaimers associated with Assistant. It can be useful when providing information to support representatives for your service provider.

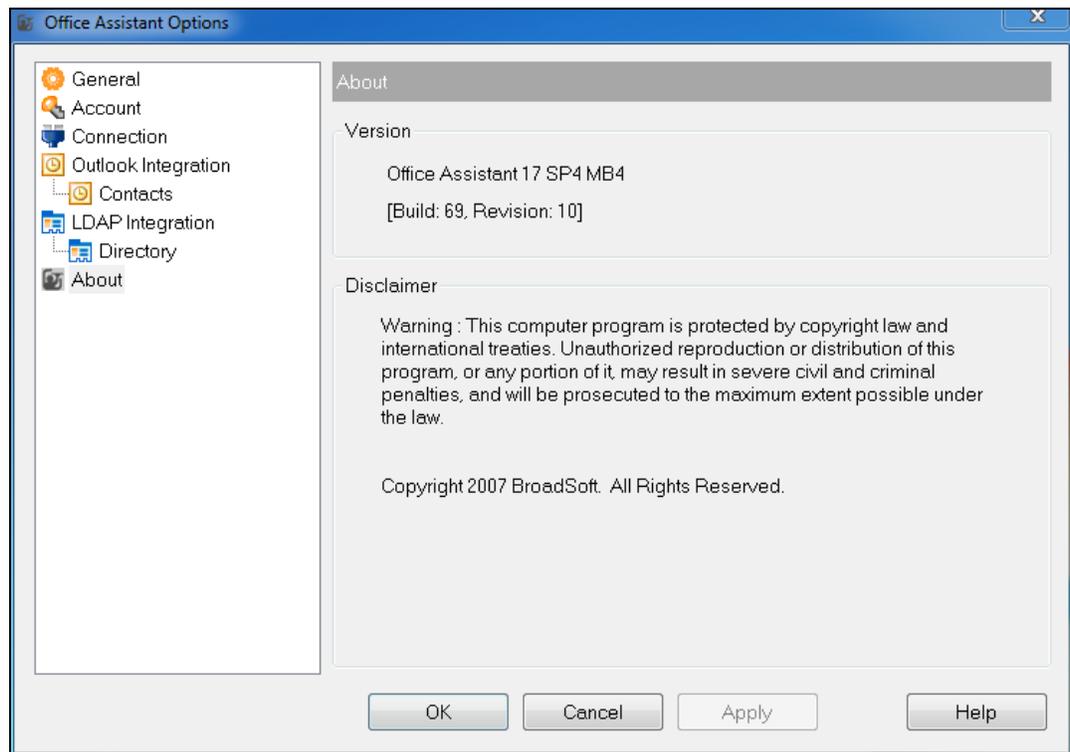


Figure 47 Options Dialog – About Page

The information displayed is as follows:

- Office Assistant Version
- Office Assistant Disclaimer

The About information is important in providing information for the purpose of technical support.

5 Services Dialog

The *Services* dialog allows you to configure the calling features provided by Assistant, such as Call Forwarding Always and Do Not Disturb. The left hand side of the dialog contains a tree view listing the configuration pages you can access. The configuration pages you select in the tree view are displayed on the right.

- Click **OK** to save all changes and close the dialog.
- Click **Apply** to save all changes without closing the dialog.
- Click **Cancel** to close the dialog without saving your changes.

NOTE: When the *Services* dialog is open, service buttons on the toolbar for the services that can be configured via the *Services* dialog do nothing when clicked. Once the *Services* dialog is closed, those buttons become operable again.

5.1 Incoming Calls

The *Incoming Calls* pages in the *Options* dialog configure the services that apply to calls that you receive.

5.1.1 Call Forwarding Always

The Call Forwarding Always service forwards all incoming calls to a specified phone number.

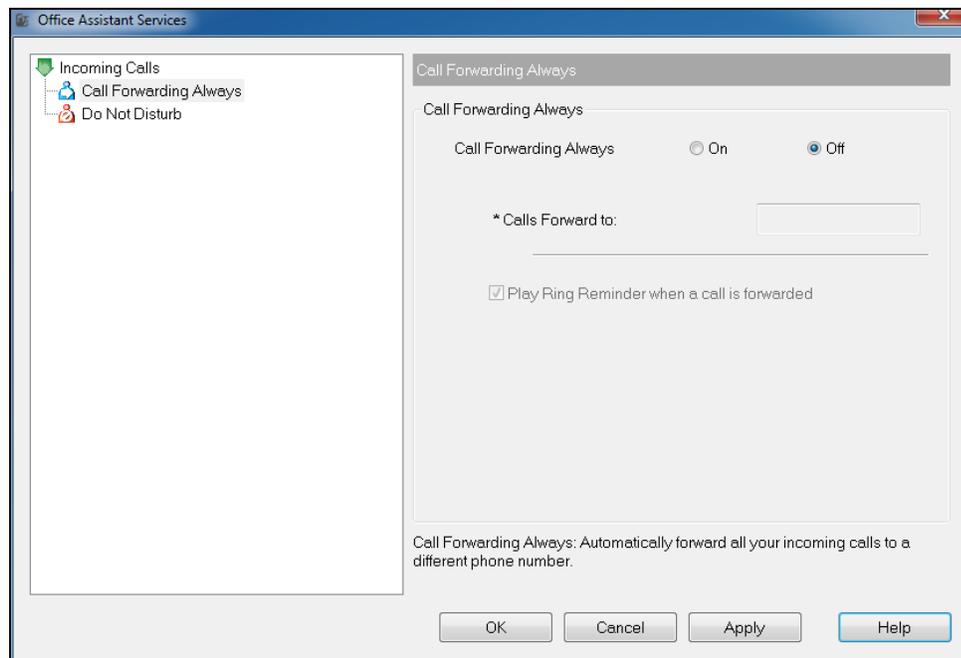


Figure 48 Services Dialog – Call Forwarding Always Page

Configure Call Forwarding Always in Assistant using the following steps.

- 1) Click on the **On** radio button.
- 2) Enter the phone number in the *Calls Forward to:* box. The number can be a 10-digit number or a valid extension within your company.
- 3) Optionally, click on the Play Ring Reminder when a call is forwarded. If applied, this option will generate a ring splash on your office phone for an incoming call that is being forwarded.
- 4) Click **Apply** to save or **OK** to save and exit from the Services dialog.

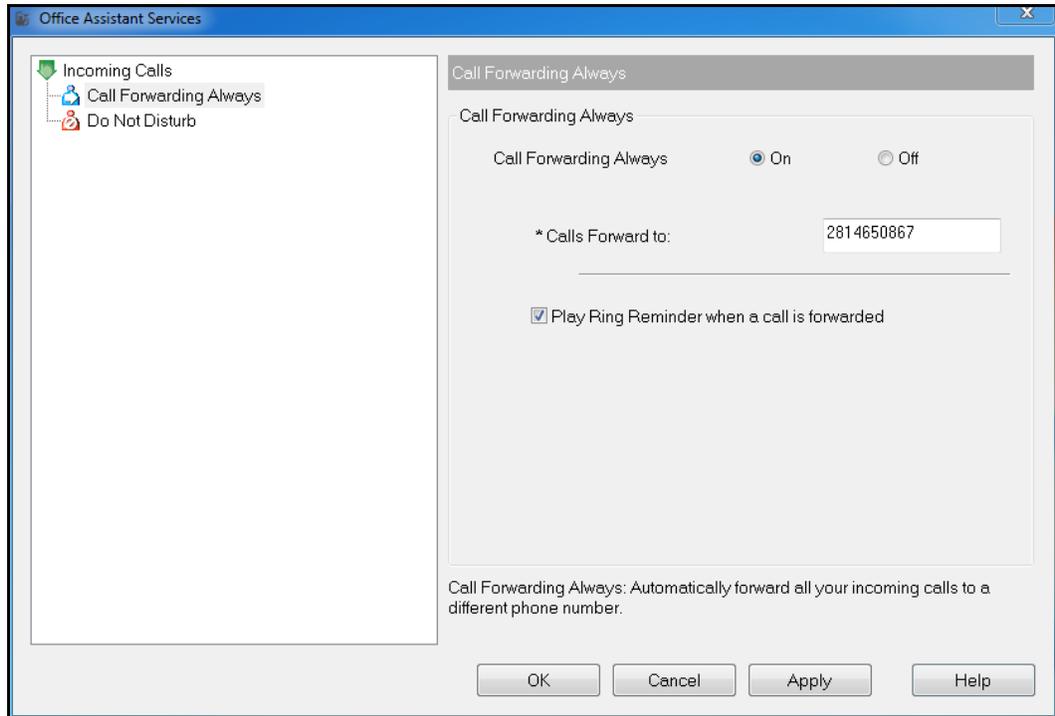


Figure 49 Services Dialog – Call Forwarding Always Activated

After the initial configuration, click on the **Call Fording Always** button to activate the service. The button will be highlighted when the service is activated.



Figure 50 Highlighted Call Forwarding Always Button - Service Activated

Clicking on the **Call Forwarding Always** button again will deactivate the service. When the service is deactivated, the button will not be highlighted.

5.1.2 Do Not Disturb

The Do Not Disturb service forwards all incoming calls to your Voice Messaging service and the caller will hear the configured busy greeting. If you do not have a Voice Messaging service configured, callers hear a busy tone.

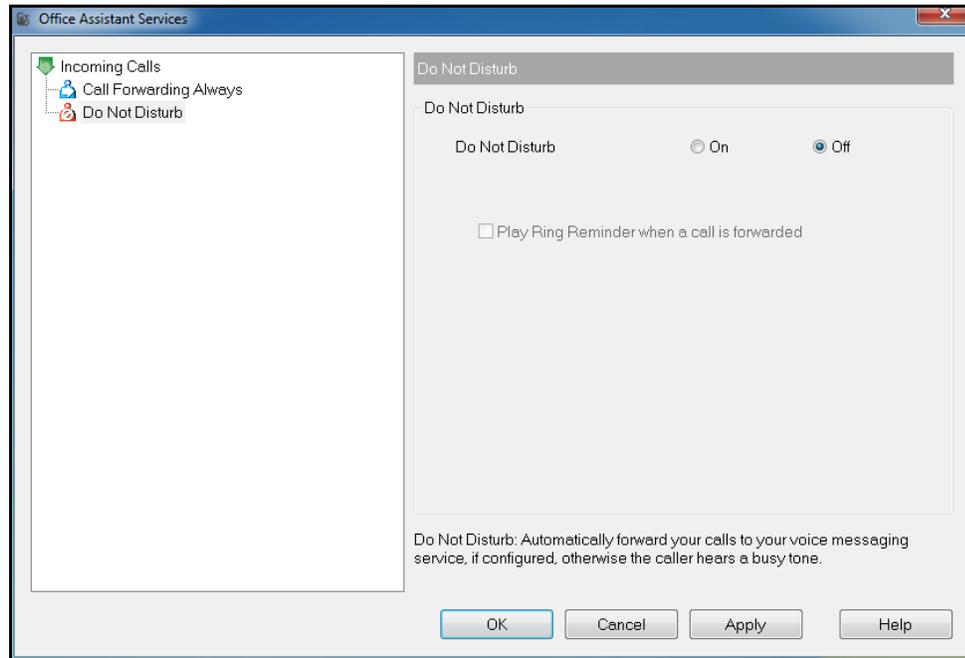


Figure 51 Services Dialog – Do Not Disturb Page

Configure Do Not Disturb in Assistant using the following steps.

- 1) Click on the **On** radio button.
- 2) Optionally, click on the Play Ring Reminder when a call is forwarded. If applied, this option will generate a ring splash on your office phone for an incoming call that is being forwarded to voice mail.
- 3) Click **Apply** to save or **OK** to save and exit from the Services dialog.

To activate this service, click **Do Not Disturb** on the toolbar. This is highlighted when in service.



Figure 52 Highlighted Do Not Disturb Button - Service Activated

Clicking on the Do Not Disturb button again will deactivate the service. The button is not highlighted when the service is turned off.

5.2 Other Services

Other features and services for your Hosted PBX services are configurable using the My Phone User Portal

- 1) Click on the **Hosted PBX Web Links** drop-down list.



Figure 53 Hosted PBX Web Links Drop-down (Internet Explorer)

- 2) Click on the Hosted PBX My Phone User Portal link.

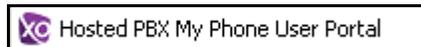


Figure 54 Hosted PBX My Phone User Portal Web Link (Internet Explorer)

- 3) Your browser will be redirected to the My Phone User Portal login page. Enter your credentials and login.

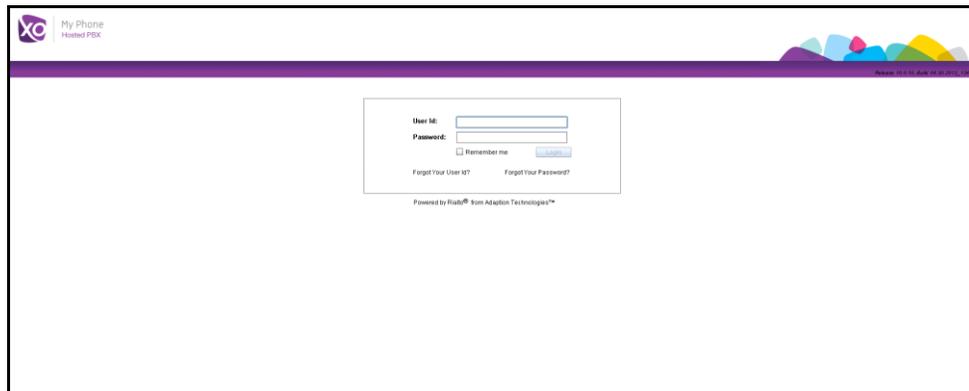


Figure 55 Hosted PBX My Phone User Portal login screen

Additional information on how to use the My Phone User Portal is available by accessing the Hosted PBX Support web site. This can also be accessed from Assistant by clicking on the **Hosted PBX Support** link in the Hosted PBX Web Links drop-down list.



Figure 56 Hosted PBX Support Web Link (Internet Explorer)

6 Troubleshooting

This section contains information that may aid those having difficulty using Assistant. If your problem is not listed in the index, contact your service provider for assistance.

6.1 Using Assistant with Microsoft Windows Service Pack 2 (SP2)

When you open the Group Directory or Personal Directory from the toolbar, Internet Explorer or Firefox may display the following warning message:



Figure 57 Internet Explorer Warning

This warning is triggered by the JavaScript used by Assistant to sort directory listings.

The following instructions override the warning and open the directory:

- 1) Click the message.
The notification turns blue and displays a pop-up menu.
- 2) Select *Allow Blocked Content* from the pop-up menu.

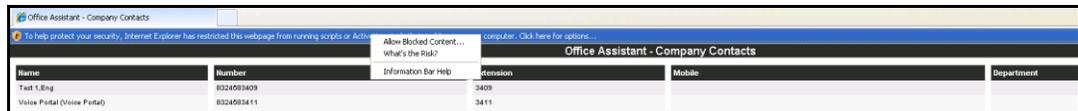


Figure 58 Internet Explorer Warning

Another security warning appears.

- 3) Click **Yes**.

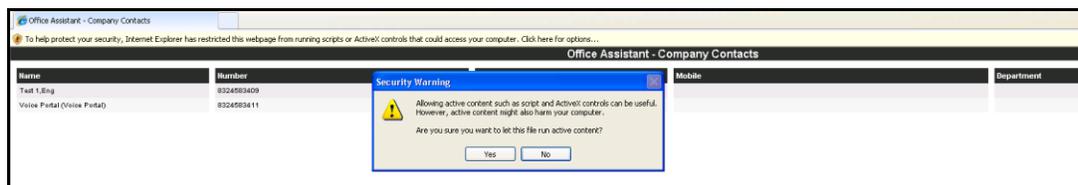


Figure 59 Internet Explorer Security Warning

6.2 Assistant Not Visible in Outlook

If the Assistant toolbar is not visible in Outlook, follow these steps. If the problem is not solved, contact your service provider.

Make the Assistant–Enterprise Toolbar visible:

- 1) Right-click an empty area of the toolbar region in Outlook.

A menu appears listing all the toolbars currently registered.

- 2) Make sure that the Assistant entries (*Office Assistant Call Control* and *Office Assistant Services*) are checked, as shown in *Figure 60 Outlook Toolbar Options*.

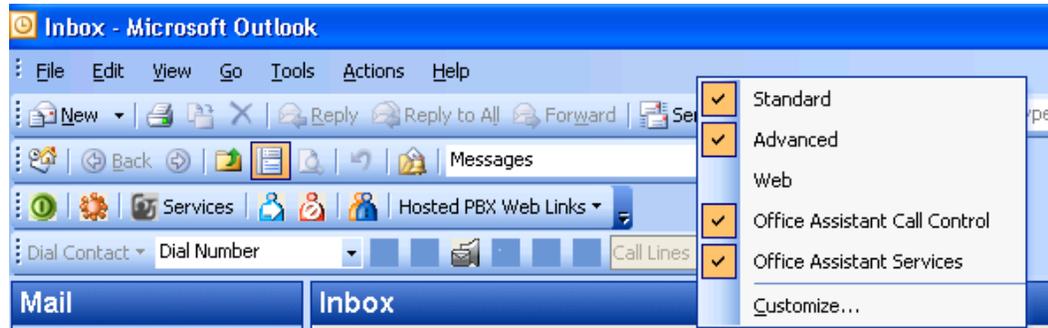


Figure 60 Outlook Toolbar Options

If the Assistant entries are not listed, continue with the next step.

6.3 Register Assistant within Outlook

- 1) Click on Help or About Microsoft Office Outlook.
- 2) In the dialog box select *Disabled Items*. If the *Telephony Toolbar* is visible on the list, click **Enable** and restart Outlook.

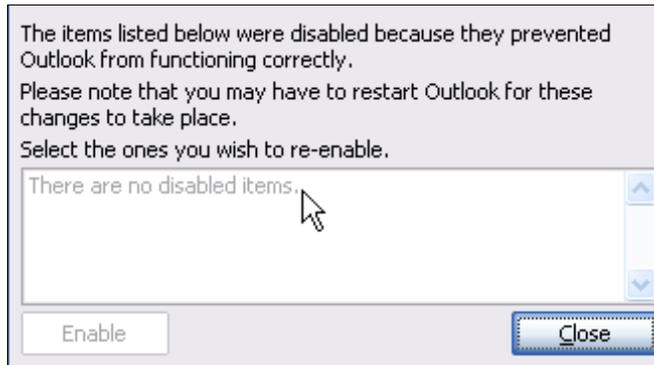


Figure 61 Disabled Items Dialog

6.4 Assistant Not Visible in Internet Explorer

If the Assistant toolbar is not visible in Microsoft Internet Explorer, follow these steps:

- 1) Right-click an empty area of the toolbar region in Explorer.
A menu appears listing all the toolbars currently registered.
- 2) Make sure that the Assistant entries (*Telephony Toolbar Call Control*, *Telephony Toolbar Services* for Assistant–Enterprise) are checked, shown in *Figure 62 Internet Explorer Toolbar Options*.



Figure 62 Internet Explorer Toolbar Options

If your problem is still not solved, contact your support organization.

7 Known Issues

This section specifies the known issues of Assistant–Enterprise.

7.1 Outlook 2007 Limitation

When the user performs a search, or opens a directory (such as the group directory) using the Toolbar in Outlook 2007, Outlook 2007 creates multiple "Office Assistant" listings under "My Contacts". Only one of the entries is correct. Clicking on a duplicate entry displays an error message that says "The Operation Failed" and Outlook 2007 removes the entry. This is a side effect of Outlook 2007 shortcut folders and the error message can be ignored."

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